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May 6, 2013

ISSUE 45



Greetings!

In This Issue

[May 10th - CaLBOC Statewide Conference](#)

[School Districts Cannot Spend Bond Money on Projects Not Disclosed](#)

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May 10, 2013  
2nd Annual  
CaLBOC Conference  
Pagoda Building  
429 J Street  
Sacramento, CA 95814  
- \$50 per person -

Tentative Schedule:

9:00 to 10:00 am

Doors Open, Refreshments

10:00 to 10:15 - Introduction:  
Michael Day, CaLBOC President

10:15 to 11:00

Michael Bishop & Joe Dixon,  
Santa Ana Unified School  
District. Accountability in School  
Facilities Programs

11:00 to 11:15 - Break

11:15 to 12:00

Assemblymember  
Joan Buchanan:  
Co-author of AB 182

12:15 to 1:00pm - Lunch with  
Keynote Speaker: State  
Treasurer Bill Lockyer

1:00 to 1:15 - Break

1:15 to 2:15 - Kevin Carlin:  
Understanding Lease  
Leasebacks

2:15 to 3:15 - Joel Thurtell:  
Breaking the CAB Story

3:15 to 3:45 - Michael Day,  
Closing

**2013 Conference**

CaLBOC Board  
Meeting Schedule:  
May 10, 2013  
August 9, 2013  
November 15, 2013  
Sacramento Chamber of  
Commerce, 1 Capitol Mall.  
Conference call access

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**Mission Statement**

To promote school district accountability by improving the training and resources available to California's Proposition 39 School Bond Oversight Committees and educating the state legislature, local school boards and the public about the oversight and reporting powers these Citizens' Bond Oversight Committees (CBOCs) have, and to advocate on a state level, where appropriate, on issues of common concern to all CBOCs.

**Archived Newsletters**

To view all with topics visit:

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[ISSUE 38 - Dec 31 2012](#)

[ISSUE 37 - Dec 17, 2012](#)

[ISSUE 36 - Dec 11, 2012](#)

[ISSUE 35 - Dec. 4, 2012](#)

[ISSUE 34 - Nov 27, 2012](#)

**Friday May 10, 2013 - Sacramento**  
**Second Annual CaLBOC Statewide Conference**  
**Communication and Responsible Expenditures:**  
**The Keys to Maintaining Public Trust in School Bond Programs**  
**Keynote Speaker: Bill Lockyer, State Treasurer**  
**Assemblywoman Joan Buchanan**  
**Co-author of AB 182 - Limits Bond Debt Ratio**  
**[2013 Conference Event Page](#) - Reserve Your Seat with Lunch Now!**  
**[Limited Seating - Register Now!](#)**

[Press Release](#)

## May 10th CaLBOC Statewide Conference

The California League of Bond Oversight Committees (CaLBOC) is proud to present the diverse views of key stakeholders and thought leaders in the School Bond space at its second annual conference. Tens of Billions of Dollars of School construction bonds have been approved by voters over the past decade, and Citizens Bond Oversight Committees are a primary line of defense in seeing that these funds are spent wisely. Issues surrounding these bonds have permeated the news over the last year.

Capital Appreciation Bonds (CABs), where Districts have been found to be spending over 23 times the amount borrowed on debt service, have been a hot topic since national news reports on the Poway School District broke last year. **State Treasurer Bill Lockyer** will discuss efforts his office has undertaken to control this issue until legislation arrives. **Joel Thurtell**, a former reporter for the Detroit Free Press, provides background on how the story evolved. **Assemblywoman Joan Buchanan** (D-San Ramon) will discuss AB-182, the bill currently working its way through the legislature that seeks to deal with this issue.

From the standpoint of how things look for a School District CaLBOC features two long time District executives with Santa Ana Unified. Santa Ana is one of the 50 largest school districts in the country, and 6th largest in California. **Michael Bishop** recently retired after 16 years with the District as CBO, and **Joe Dixon** is the Assistant Superintendent, Facilities & Governmental Relations for SAUSD. In addition, Joe is the current Chair of the Coalition for Adequate School Housing (CASH), the largest lobbying/advocacy group for the school facilities industry in the state.

Rounding out the event will be a discussion with **Kevin Carlin** on the use of the lease/lease-back school construction method. This approach has been both lauded for its ability to provide districts with a streamlined development process by some while it has been vilified as a way to avoid competitive bidding by others.

In 2013 CaLBOC celebrates five years of fulfilling its twin purposes of providing support to local bond oversight committee members through training, while also advocating for them at the legislature on items of common interest. Attend CaLBOC Conference 2013: Transparency and dialog in action.

**The CaLBOC Conference runs from 9 am to 4 pm on Friday, May 10th at the Pagoda Building, 429 J Street, Sacramento. Visit [www.calboc.org](http://www.calboc.org) for registration information**

**[Reserve Your Seat & Lunch Now! 2013 Conference](#)**

## School Districts Cannot Spend Bond Money on Projects Not Disclosed to Voters - School Bonds with 55 Percent Vote Threshold Must Contain a List of Specific Projects to be Funded

May 1, 2013 | Kelly Salt | [www.jdsupra.com](http://www.jdsupra.com)

**EXCERPT:** The Fourth District Court of Appeal recently upheld a challenge to a school district's spending voter-approved bond proceeds for field lighting at a high school stadium because the ballot proposition did not specifically list or otherwise include field lighting as a project to be funded by the bonds for that high school. As a result, the school district is prohibited from using the bond proceeds to fund the lighting improvements. [Taxpayers for Accountable School Bond Spending v. San Diego Unified School District](#) emphasizes the importance of ensuring that the project list included in a bond measure sufficiently identifies the improvements to be constructed with the bond proceeds.

In 2008 the San Diego Unified School District (SDUSD) submitted a school bond measure (Proposition S) to the voters. Proposition S contained a bond project list comprised of two parts. [Part one](#) allocated a specific amount of the bond proceeds to each school to be spent on qualified, permitted projects. Specific projects to be financed at all school sites included improvements "to support student health, safety, and security." School site security improvements, "including increased lighting," were identified as examples of these types of improvements. [Part two](#) identified specific projects to be completed at all school sites and at particular schools. Included in the specific list of projects for Hoover High School was the renovation and replacement of the school's stadium bleachers and press box, and the upgrade of "fields, track, and courts for accessibility compliance." Proposition S also authorized bond proceeds to be used for construction and other costs incidental to and necessary for completion of the listed projects. Other incidental costs necessary to complete the projects listed in the measure included athletic playing fields and "field lighting." ...

... The Court of Appeal noted that the state constitution requires that a school bond that has a 55 percent vote threshold, such as Proposition S, must contain "a list of the specific school facilities projects to be funded." School districts can seek bonds without such a list, but the bond measures face a higher vote threshold - at least two-thirds. The court held the Proposition S bond proceeds could not be used for the Hoover High School stadium lighting because: **(1)** project list included the renovation of the stadium's seating and press box, but did not expressly include lighting for the field; **(2)** the upgrade of the field was limited to improvements for accessibility compliance and lighting was not required for this purpose; and **(3)** field lighting was not incidental to or necessary for the completion of the renovation or replacement of the stadium bleachers or the press box. ...

**To read the complete article, please visit:**

[www.jdsupra.com/legalnews/school-districts-cannot-spend-bond-money-18764/](http://www.jdsupra.com/legalnews/school-districts-cannot-spend-bond-money-18764/)

**[www.CaLBOC.org](http://www.CaLBOC.org)**

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